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3. Participant Search, Folder and Summary

3.1 Participant List

The initial window of the WIC system allows the user to reach all functions of the system, including the Participant Folder, Build Master Calendar, Local Agency Outreach, System Outputs and System Tools. The Participant List creates the foundation of the WIC Central Administrative Site application. This document describes the various functions for searching and displaying the participant list. The Participant list can be sorted and displayed in several ways.

This criterion is the current view of the participant list. The current view is an Agency level view initially set upon login of the system.

The title bar and columns of each window will change to reflect the selected View.

The screenshot shows a software window titled "CAS - Participant List - Local". It has a menu bar with "File", "Participant List", "Activities", "Breastfeeding", and "Help". Below the menu is a toolbar with icons for a folder, a printer, a calendar, a magnifying glass, and a folder with a plus sign. The main area is divided into two sections. The left section, titled "Where to Search", contains radio buttons for "On-site", "Local" (selected), "Statewide", and "Appointments for Today", along with a "Program" dropdown menu set to "WIC". The right section, titled "Demographics", contains input fields for "State WIC ID", "Household ID", "PAN#", "Last Name", "First Name", "MI", "SSN", "Date of Birth", and "Agency", along with "Search", "Clear", and "Show Details" buttons. Below these sections is a table with the following columns: "State WIC ID", "Household ID", "Last Name", "First Name", "MI", "Date of Birth", and "WIC Category". The table contains 15 rows of participant data.

State WIC ID	Household ID	Last Name	First Name	MI	Date of Birth	WIC Category
			ABBI		02/23/2007	Infant
			ALICIA	Y	03/07/1980	Pregnant
			APRIL		04/14/1974	Non-breastfeeding
			GRADY	L	04/04/2005	Child
			HALEY		03/28/2006	Child
			RACHEL		06/21/1988	Breastfeeding
			TRENTON	L	01/08/2003	Child
			BLAINE		12/09/2002	Child
			JADEN	C	04/27/2004	Child
			JONATHON		02/20/2000	Child
			MARIA		04/05/1970	Non-breastfeeding
			SHYANNE	J	03/12/2004	Child
			SIERRA	N	01/02/2002	Child
			JESSE	R	03/31/1998	Child
			CHRISTOPHER		03/10/2003	Child

The status bar at the bottom right shows the date and time: "3/7/2008 11:09 AM".

Figure 1 - Participant List (Details Hidden)

CAS - Participant List - Local

File Participant List Activities Breastfeeding Help

Where to Search

☐ On-site
☒ Local
☐ Statewide
☐ Appointments for Today

Program: **WIC**

Demographics

☐ State WIC ID
☐ Household ID
☐ PAN#

Last Name: Date of Birth:
 First Name: MI: SSN:
 Agency:

Search **Clear** **Hide Details**

State WIC ID	Household ID	Last Name	First Name	MI	Date of Birth	WIC Category
			ABBI		02/23/2007	Infant
			ALICIA	Y	03/07/1980	Pregnant
			APRIL		04/14/1974	Non-breastfeeding
			GRADY	L	04/04/2005	Child
			HALEY		03/28/2006	Child
			RACHEL		06/21/1988	Breastfeeding
			TRENTON	L	01/08/2003	Child
			BLAINE		12/09/2002	Child

Participant Details:

WIC Category: **Infant**
 Gender: **Female**
 Next Appointment: **N/A**
 Telephone: **N/A**

Certification Effective: **02/04/2008**
 Certification End: **08/04/2008**
 Termination Date: **N/A**
 Termination Reason: **N/A**

Last Date to Use
 N/A
 04/04/2008
 03/04/2008

Issued
 Issued

Issuance Frequency: **Bi-monthly**

3/22/2008 2:59 PM

Figure 2 - Participant List (Details Shown)

3.1.1 Controls

This section describes the behavior of the controls on the Participant List window.

3.1.1.1 Where to Search Radio Button Group

The radio button group consists of the following buttons:

- On-site
- Local
- Statewide
- Appointments for Today

The radio button group is disabled when the window is active.

3.1.1.2 Program Dropdown

This control allows the user to indicate which Program database to include in the search criteria. This dropdown will always display the 'WIC' program. Additional programs is displayed if applicable to your state requirements.

3.1.1.3 State WIC ID Radio Button and Masked Edit Box

The radio button is enabled when the Participant List is active. When this radio button is selected, the State WIC ID masked edit box is enabled. Otherwise the masked edit box is disabled. It allows the entry of alphabetic and numeric characters. The mask for the box is "#####". If less than the maximum number of digits is entered into the masked edit box, it will be padded with preceding zeros.

3.1.1.4 Household ID Radio Button and Masked Edit Box

The radio button is enabled when the Participant List is Active. When this radio button is selected, the Household ID masked edit box is enabled. Otherwise, the masked edit box is disabled. It allows the entry of alphabetic and numeric characters. The mask for the box is "#####". If less than the maximum number of digits is entered into the masked edit box, it will be padded with preceding zeros.

3.1.1.5 PAN# Radio Button

The control allows the selection of the PAN (Primary Account Number) as the search criteria. It is enabled when the Electronic Benefit Transfer (EBT) food delivery system is enabled for the clinic and the Participant List window is active. (For more information about enabling the Electronic Benefit Transfer (EBT) food delivery system, see the Update Clinic Dialog section of [Application Administration Chapter 09 - Reference Utility](#).)

3.1.1.5.1 PAN# Text Box

The control accepts a PAN by which to search for a participant. It is enabled when the radio button is selected. Characteristics for the PAN# text box are defined in the [Consistencies](#) chapter.

NOTE: Multiple PANs may be linked to the Household EBT Account, since cards become deteriorated or are lost. The search will result in the household linked to the card number.

3.1.1.6 Demographics Radio Button

The radio button is enabled when the Participant List is Active. When this radio button is selected, the demographic controls become enabled. Otherwise, the Demographic controls is disabled.

3.1.1.7 Demographics - Last Name Text Box

This control allows the user to enter a complete or partial last name as search criteria. The text box will be enabled when the Demographic radio button is selected. The maximum length allowed for the value is twenty-five (25) characters. It allows the entry of alphabetic characters, spaces, and the following special characters: { ' , - }. Alphabetic characters are converted to uppercase.

3.1.1.8 Demographics – Date of Birth Masked Edit Box

This control allows the user to select the Date of Birth as search criteria. The masked edit box is enabled when the Demographics radio button is selected. It allows the entry of numeric characters. The mask for the box is "###/###/####" to accept a date with a four digit year.

3.1.1.9 Demographics - First Name Text Box

This control allows the user to enter a complete or partial first name as search criteria. The text box will be enabled when the Demographic radio button is selected. It allows the entry of alphabetic characters, spaces, and the following special characters: { ' , - }. Alphabetic characters are converted to uppercase. The maximum length allowed for the value is twenty (20) characters.

3.1.1.10 Demographics - Middle Initial Text Box (MI)

This control allows the user to enter the middle initial as search criteria. The text box will be enabled when the Demographic radio button is selected. It allows the entry of alphabetic characters. Alphabetic characters are converted to uppercase. The maximum length allowed for the value is one (1) character.

3.1.1.11 Demographics – SSN Masked Edit Box (SSN)

This control allows the user to enter the social security number as search criteria. The masked edit box is enabled when the Demographics radio button is selected and the [HideSSN](#) business rule is set to "N". It allows the entry of numeric characters. The mask for the box is "####-##-####". If the [HideSSN](#) business rule is set to "Y", the masked edit box will not be visible.

3.1.1.12 Agency Dropdown Box

The dropdown box is disabled when the Participant List Window is active. The control will display the Agency location selected from the Select Location dialog. This is a read-only control.

3.1.1.13 Search button

The Search button will be enabled when the Participant List window is active. Its mnemonic is 'S'.

3.1.1.14 Clear button

The Clear button will be enabled when the Participant List window is active. Its mnemonic is 'C'.

3.1.1.15 Show/Hide Details button

The Show/Hide button will be enabled when the Participant List window is active. Its mnemonic is 'D'.

3.1.1.16 Participant List Grid

This control allows the user to select the appropriate participant with which to work.

The participant list will be initially sorted by Last Name, First Name, and Middle Initial. The first entry is initially selected. The participant list grid will contain the following columns:

- Household ID
- State WIC ID
- Last Name
- First Name
- Middle Initial (MI)
- Date of Birth
- WIC Category
- Clinic Number

Double-clicking on a participant's record in the grid will [open the participant folder](#) for the selected participant.

3.1.1.17 Detail Panel - WIC Category Text and Value Label

This control is displayed when the Show Details panel is active. This control allows the user to view the WIC Category at the most recent certification for the participant selected in the participant list. The value label will invoke the lookup value corresponding to the WIC-Status column of the MEMBER table. It will invoke as read-only in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the dialog.

3.1.1.18 Detail Panel - Gender Text and Value Label

This control is displayed when the Show Details panel is active. This control allows the user to view the gender of the participant selected in the participant list. The value label will invoke the lookup value corresponding to the Gender field of the MEMBER table. It will invoke as read-only text in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the dialog.

3.1.1.19 Detail Panel - Next Appointment Text and Value Label

This control is displayed when the Show Details panel is active. This control allows the user to view the Next Appointment for the participant selected in the participant list. The value label will invoke the lookup value corresponding to the AppointmentDate column of the APPOINTMENT table where AppointmentDate is equal to or greater than today's date and less than the AppointmentDate for any other appointment scheduled for the participant. It will invoke as read-only text in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the dialog.

3.1.1.20 Detail Panel - Telephone Text and Value Label

This control is displayed when the Show Details panel is active. This control allows the user to view the primary telephone number for the household of the participant selected in the participant list. The value label will invoke the lookup value corresponding to the Telephone1 field of the HOUSEHOLD table. It will invoke as read-only text in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the dialog.

3.1.1.21 Detail Panel - Certification Effective Text and Value Label

This control is displayed when the Show Details panel is active. This control allows the user to view the effective date of the most recent certification period for the participant selected in the participant list. It will invoke as read-only text in the inverse color of the form. The value label will invoke the lookup value corresponding to the CertificationEffectiveDate column of the CERTCONTACT table. Note that this control does not get focus and is not included in the tab order of the dialog.

3.1.1.22 Detail Panel - Certification End Text and Value Label

This control is displayed when the Show Details panel is active. This control allows the user to view the end date of the most recent certification period for the participant selected in the participant list. It will invoke as read-only text in the inverse color of the form. The value label will invoke the lookup value corresponding to the CertificationEndDate column of the CERTCONTACT table. Note that this control does not get focus and is not included in the tab order of the dialog.

3.1.1.23 Detail Panel - Termination Date Text and Value Label

This control is displayed when the Show Details panel is active. This control allows the user to view the termination date for the participant selected in the participant list. If the Terminated field of the MEMBER table is 'Y', the value of the Terminated-Date field of the MEMBER table will be invoked. If the Terminated field of the MEMBER table is not 'Y', the text, "N/A" will be invoked. It will invoke as read-only text in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the dialog.

3.1.1.24 Detail Panel - Termination Reason Text and Value Label

This control is displayed when the Show Details panel is active. This control allows the user to view the termination reason for the participant selected in the participant list. When a date is invoked in the Termination Date field, the value label will invoke the description from the ReferenceDictionary table where field CATEGORY = 'TERMREASON' associated with the value of the Cert-Termination-Reason field of the CERT-CONTACT table. If "N/A" is invoked in the Termination Date field, the value label will invoke "N/A". It will invoke as read-only text in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the dialog.

3.1.1.25 Detail Panel - Last Date to Use Group Box

This group box is displayed when the Show Details panel is active. This group box contains the Last Use Date printed on the WIC checks issued to the selected participant. It also allows the user to view the issuance frequency for the selected participant.

3.1.1.25.1 Detail Panel - Last Date to Use Value Labels

This control is displayed when the Show Details panel is active. This control allows the user to view the Last Use Date printed on the checks issued to the selected participant. The value label will invoke the value of the Last-Check-LDTU column of the MEMBER table. It will invoke as read-only text in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the dialog.

3.1.1.25.2 Detail Panel - Issuance Frequency Text and Value Label

This control is displayed when the Show Details panel is active. This control allows the user to view the issuance frequency of the participant selected in the participant list. The value label will invoke the value of the look up value of the IssuanceFrequency field of the MEMBER table. It will invoke as read-only text in the inverse color of the form. Note that this control does not get focus and is not included in the tab order of the dialog.

3.1.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Participant List window.

3.1.2.1 Initializing the Interface

Upon initial presentation of the window:

- The title part text will be set to "Participant List - Local".
- The Where to Search radio button group defaults to Statewide and is disabled.
- The Program dropdown defaults to "WIC".
- The State WIC ID radio button is initially selected and the masked edit box is blank.
- The Participant List grid is initially blank.
- The Show Details panel is initially hidden.
- If the [HideSSN](#) business rule is set to "N", the SSN masked edit box is visible. If the [HideSSN](#) business rule is set to "Y", the SSN masked edit box is not visible.

3.1.2.2 Edits for Search Criteria

Upon selection of the Search button

- When the State WIC ID radio button is selected and an entry is not made in the State WIC ID field, the system will invoke a standard error message with the text, "An entry is required for the State WIC ID."
- When the Household ID radio button is selected and an entry is not made in the Household ID field, a standard error dialog is invoked with the text, "An entry is required for the Household ID."
- When the PAN# radio button is selected and an entry is not made in the PAN # field, a standard error dialog is invoked with the text, "An entry is required for the PAN #."
- When the Demographics radio button is selected, and an entry is not made in at least one of the following controls, a standard error dialog is invoked with the text, "An entry is required for at least one of the Demographics fields to perform a search."
 - Last Name text box
 - First Name text box
 - Middle Initial text box
 - Date of Birth masked edit box
 - SSN masked edit box
- If an invalid date is entered in the Date of Birth masked edit box, a standard error dialog is invoked with the text, "Invalid date entered."
- If the value entered into the Date of Birth masked edit box is greater than the system date the system will invoke a standard error message with the text 'Date entered must be less than or equal to today's date.'

3.1.2.3 Display Participant List

Upon successful completion of the above listed edits:

- If the Demographics radio button is selected, a soft search combined with a Soundex search is performed on the SPIRIT database using the values in the Last Name and First Name boxes. (For example, if the user performs a search on the Last Name of 'PATTER', a combined Soundex and soft search would yield results similar to the following: PADDER, PADDERSON, PATTER, PATTERSON, POTTER, POTTERSON, POTTERS.) A hard search is performed on the SPIRIT database using the values in the MI, Date of Birth, SSN, and Agency controls.

- If the PAN# radio button is selected, the PAN is relayed to the J.P. Morgan (JPM) Electronic Benefits Transfer (EBT) system, and a hard search is performed on the JPM database to retrieve the Household ID associated with the PAN. The Household ID is then used to perform a hard search of the SPIRIT database for participants with a matching ID.
- If any other radio button is selected, a hard search is performed on the SPIRIT database using the value in the associated box.

The system displays all records found meeting the criteria in the Participant List Grid.

If no records are found that meet the search criteria, a standard message dialog is invoked with the text, "No participant matching your search criteria could be found " Upon dismissal of the message, focus is returned to the Participant List window preserving the previously entered search criteria.

3.1.2.4 Clear

Upon selection of the Clear button, the system will clear and reset all controls on the Participant List window.

3.1.2.5 Show Details

Upon selection of the Show Details button, the system will display the details for the selected participant in the Show Details panel.

3.1.2.6 Hide Details

Upon selection of the Hide Details button, the system will hide the Show Details panel.

3.1.2.7 Saving the Data

There are no updateable controls on this window; therefore no data is saved to the database.

3.1.2.8 Data Map

There are no updateable controls on this window; therefore no data is saved to the database.

3.2 Menus

The menus presented on the Participant List window provide mouse and keyboard functionality to functions within the Central Administrative Site application. It includes the following menus:

- File
- Participant List
- Activities
- Breastfeeding
- Help

3.2.1 File Menu

This File menu contains menu items for invoking the various global features of the Central Administrative Site application. Its mnemonic is 'F'. When hovering over or selecting a file menu item, if a sub-list of items is available, the sub-list will automatically expand and be invoked. It includes the following menu items:

- File
 - System Outputs
 - System Tools
 - Exit

3.2.1.1 System Outputs Menu Item

This menu item allows the user to invoke the System Outputs function. This menu item will be enabled when the File menu is active. Its mnemonic is 'O'.

3.2.1.2 System Tools Menu Item

This menu item allows the user to invoke the System Tools function. This menu item will be enabled when the File menu is active. Its mnemonic is 'S'.

3.2.1.3 Exit Menu Item

This menu item allows the user to exit the Central Administrative Site application. This menu item will be enabled when the File menu is active. Its mnemonic is 'X'.

3.2.2 File Menu Processes

Upon selecting the System Outputs menu item, the system will expand the sub-menu as follows:

- System Outputs
 - Reports

Upon Selection of the Reports sub-menu item, the system will invoke the Generate Reports dialog defined in [Central Administrative Site Chapter 04 – System Outputs](#).

Upon selecting the System Tools menu item, the system will expand the sub-menu as follows:

- System Tools
 - Change Password
 - Set Default Printers

Upon selection of the Change Password sub-menu item, then system will invoke the Change Password dialog as described in *Security*.

Upon selection of the Set Default Printers sub-menu item, the system will invoke the Select Printers for Workstation dialog as described in as described in *System Tools*

Upon selection of the Exit menu item:

- The system will close and exit the Central Administrative Site Application.

3.2.3 Participant List Menu

This menu contains menu items that allow the user to access functions of the participant list. The menu will be enabled when the Participant List window is active. It includes the following menu items:

- Participant List
 - Open Participant Folder

3.2.3.1 Open Participant Folder Menu Item

This menu item allows the user to open a participant's folder. The menu item will be enabled when the Participant List menu is active and a participant record is selected on the participant list. Its mnemonic is 'P'.

This menu item is disabled when the current view of the participant list grid is empty or when no entry is selected in the Participant List grid.

3.2.4 Participant List Menu Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Menu.

Upon selection of the Open Participant Folder menu item:

- The system will check the permissions for the currently logged-on user to determine if they have the appropriate permissions to view the participant folder. When the user does not have the appropriate permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view the Participant Folder. Please see the supervisor."
- The system will open the Participant Folder for the currently selected household member. The Participant Folder is described in this document.

3.2.5 Activities Menu

This menu contains menu items that allow the user to perform functions on groups of participants. This menu will be enabled when the Participant List window is active. It includes the following menu items:

- Activities
 - Build Master Calendar

3.2.5.1 Build Master Calendar Menu Item

This menu item allows the user to invoke the Build Master Calendar function. This menu item will always be enabled when the system menu bar is accessible. Its mnemonic is "B" and does not have a shortcut key.

3.2.6 Activities Menu Processes

Upon selection the Build Master Calendar menu item:

- The system will check the permissions of the currently logged-on user to determine if they have the appropriate permissions to access the Build Master Calendar function. If the user does not have appropriate permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view the Master Calendar data. Please see the supervisor."
- The system will invoke the Build Master Calendar dialog.

3.2.7 Breastfeeding Menu

This Breastfeeding menu contains menu items for invoking the Breastfeeding Item Issuance History function. When hovering over or selecting a menu item, if a sub-list of items is available, the sub-list will automatically expand. It includes the following menu items:

- Breastfeeding
 - Breastfeeding Item Issuance History

3.2.7.1 Breastfeeding Item Issuance History Menu Item

This menu item allows the user to invoke the Breastfeeding Item Issuance History function. This menu item will be enabled when the Breastfeeding menu is active. Its mnemonic is 'B'.

3.2.8 Breastfeeding Menu Processes

Upon selection the Breastfeeding menu item:

- The system will check the permissions of the currently logged-on user to determine if they have the BreastfeedingItemIssuance.View permissions to access the Breastfeeding Item Issuance function. If the user does not have appropriate permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view Breastfeeding Item Issuance. Please see the supervisor."
- If the user does have the BreastfeedingItemIssuance.View permissions, the system will invoke the [Breastfeeding Item Issuance History dialog](#) described in this document.

3.2.9 Help Menu

The Help menu is provided to assist the user in finding answers to questions about how to use the Central Administrative Site application. This menu item will be enabled when the File menu is accessible. Its mnemonic is 'H'. It includes the following menu items:

- Help
 - Help on Screen
 - WIC Help Topics
 - About

3.2.9.1 Help on Screen

This menu item will allow the user to view panel-level help for the currently invoked screen. This menu item will be enabled when the Help Menu is active. Its mnemonic is 'S' and its shortcut key is 'F1'.

3.2.9.2 WIC Help Topics Menu Item

This menu item will allow the user to view a list of help topics for the WIC system. This menu item will be enabled when the Help Menu is active. Its mnemonic is 'W'.

3.2.9.3 About WIC Menu Item

This menu item allows the user to view information about the software. This menu item will be enabled when the Help Menu is active. Its mnemonic is 'A'.

3.2.10 Help Menu Processes

Upon selection of the Help on Screen menu item, the system will invoke the Central Administrative Site application panel level help. This function is also invoked when pressing the F1 key.

Upon selection of the WIC Help Topics menu item, the system will invoke the Help Topics: Central Administrative Site Help System at the Index tab of the help function.

Upon selection of the About WIC menu item, the system will invoke the About WIC application information dialog.

3.2.11 Toolbar

In addition to the system toolbar options, toolbar options specific to the participant list are available when the participant list is active.

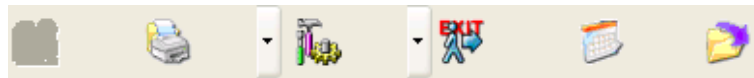


Figure 3 - Participant List Toolbar

3.2.11.1 Manage Waiting List Toolbar Button

This toolbar button allows the user to manage the waiting list. It is disabled when the Participant List is active. It has a tool tip text of "Manage Waiting List".



Figure 4 - Manage Waiting List Toolbar Button

3.2.11.2 System Outputs Toolbar Button

This toolbar button allows the user to invoke the System Outputs function. It will be enabled when the Participant List is active. It has a tool tip text of "System Outputs".



Figure 5 - System Outputs Toolbar Button

3.2.11.3 System Tools Toolbar Button

This toolbar button allows the user to invoke the System Tools function. It will be enabled when the Participant List is active. It has a tool tip text of "System Tools".



Figure 6 - System Tools Toolbar Button

3.2.11.4 Exit Toolbar Button

This toolbar button allows the user to exit the Central Administrative Site application. It will be enabled when the Participant List is active. It has a tool tip text of "Exit Central Administrative Site Application".



Figure 7 - Exit Toolbar Button

3.2.11.5 Build Master Calendar Toolbar Button

This toolbar button allows the user to invoke the Build Service Site Calendar function. This toolbar button will be enabled when the Participant List window is active. It has a tool tip text of "Build Master Calendar".



Figure 8 - Build Master Calendar Toolbar Button

3.2.11.6 Open Participant Folder Toolbar Button

This toolbar button allows the user to open a participant's folder. This toolbar button will be enabled when the Participant List Window is active and a participant record is selected on the participant list. It has a tool tip text of "Open Participant Folder."



Figure 9 - Open Participant Folder Toolbar Button

3.2.12 Toolbar Processing

Upon selecting the System Outputs toolbar button, the system will invoke the Generate Reports dialog defined in [Central Administrative Site Chapter 04 – System Outputs](#).

Upon selecting the System Tools toolbar button, the system will expand the sub-menu as follows:

- System Tools
 - Change Password (mnemonic of 'P')

Upon selection of the Change Password sub-menu item, the system will invoke the [Set Password dialog](#) as described in Application Administration - *Chapter 2 – Security*.
 - Set Default Printers (mnemonic of 'D')

Upon selection of the Set Default Printers sub-menu item, the system will invoke the [Default Printers dialog](#) as described in as described in Common Interface Panels *Chapter 5 - System Tools*

Upon selection of the Exit toolbar button, the system will close and exit the Central Administrative Site Application..

Upon selection of the Build Master Calendar toolbar button:

- The system will check the permissions of the currently logged-on user. If the user does not have at least the MasterCalendar.View permission, a standard error dialog is invoked with the text, "You do not have the necessary permissions view the master calendar. Please see the supervisor."
- If the user has the appropriate permission, the system will invoke the Build Service Site Calendar dialog described in [Chapter 02 - Build Master Calendar](#).

Upon selection of the Open Participant Folder toolbar button

- The system will check the permissions for the currently logged-on user to determine if they have at least View level access defined for any of the following features; Demographics, Height/Weight Blood, Risk Factors, Nutrition Education, Income History, Referrals, Benefit Issuance, Food Prescriptions, SOAP Notes, Breastfeeding Notes, General Notes, VENA History, Health Information, Immunizations, Breastfeeding Contacts, Breastpump Management, or Certifications. When the user does not have the any above listed permissions, a standard error dialog is invoked with the text, "You do not have the necessary permissions to view the Participant Folder. Please see the supervisor."

- If the user has at least View level access defined for any of the following features the system will invoke the Participant Folder for the currently selected household member in read-only mode.
- The system will check the permissions for the user logged-on to determine the permission level for Displaying Alerts as defined in Common Interface Panels – [*Chapter C - Display Alerts for Household Member*](#) - as well as the Alert type to display. The alerts is displayed as follows:
 - If the Alert is a protected alert and the user does not have the ProtectedAlert.View permission, the alert will not be displayed.
 - If the Alert is a protected alert and the user does have the ProtectedAlert.View permission, the alert is displayed
 - If the Alert is a non-protected alert and the user does not have the Alert.View permission, the non-protected alert will not be displayed.
 - If the Alert is non-protected alert and the user does have the Alert.View permission, the non-protected alert is displayed
 - If no alerts exist or the system determines the user does not have the permissions described, the Display Alerts dialog will be bypassed.

3.3 Participant Folder

The Participant Folder is a view of information for the participant segmented into separate screens similar to the way a paper-based hanging file is separated by individual file folder tabs. A folder may be opened in one of several ways:

- double-clicking on an item in the Participant List
- selecting a participant from the Participant List and selecting the Open Participant Folder option on the Participant List menu
- selecting a participant from the Participant List and selecting the Open Folder toolbar button

Figure 10 - Participant Folder

3.3.1 Initializing the Interface

Upon initial display, set the title bar text to "Member.FirstName Member.MiddleInitial Member.LastName – [Descriptive Value of Age](#) – WIC ID: Member.StateWICID Household ID: Member.HouseholdID"

Descriptive Value of Age
For 'Infant' display 'XX' Months 'XX' Days, calculated from the Date of Birth.
For 'Child' display 'XX' Year(s) 'XX' Months 'XX' Days calculated from the Date of Birth
For 'Pregnant' display 'XX' weeks gestation calculated from LMP
For 'Breastfeeding' and 'Non-breastfeeding' display 'XX' Years calculated from the Date of Birth

If the participant or a member of the participant's household is flagged for an Alert, upon opening the participant's folder, the system will automatically invoke the Display Alerts dialog defined in the Common Interfaces Panels – [*Chapter C – Display Alerts for Household Member*](#). However, the Delete Alert button will not be visible. Deleting an alert is not allowed when the dialog is displayed in CAS mode.

The default tab displayed when the Participant Folder is opened will be the first available tab for which the user is granted permission. Refer to *Security*. The controls on the tab will be locked and the values cannot be modified. When the user permissions are 'None' for a tab, the tab is disabled and not available for selection. The following is a list of folder tabs available and the order in which the default and user permissions are verified when a participant folder is open:

Tab
Demographics
Height/Weight/Blood (HT\WT\Blood)
VENA
Risk Factors
Food Prescription
Nutrition Education
Benefits History
Immunizations
Referrals
Health Information tab [Infant/Child]
Health Information tab [Woman]
Income History
Appointments
Certification History (if the CLN_ShowCertificationHistory business rule is set to "Y")

Once a folder is opened, depending on the WIC Category of the participant (or applicant) the folder will enable only those tabs and controls that apply to only the WIC Category of the participant. Refer to the respective tabs for specific information on Participant Folder tabs and sub-tabs.

3.3.2 Edits (Participant Folder)

Data may not be modified in the Participant Folder in the Central Administrative Site application. The information displayed is view only.

3.3.3 Toolbar Exceptions

In addition to the system toolbar options, when the Participant Folder is active several additional toolbar options are available.



Figure 11- Participant Folder Toolbar

3.3.3.1 Print Participant Summary Toolbar Button

This toolbar button allows the user to produce the Participant Summary Report defined in [System Outputs Chapter 01 – System Outputs](#) for the participant whose Participant Folder is displayed. The toolbar button will be enabled when the Participant Folder is active. It has a tool tip text of "Print Participant Summary".



Figure 12- Print Participant Summary Toolbar Button

3.3.3.2 Close Participant Folder Toolbar Button

This toolbar button allows the user to close the Participant Folder and return to the participant list. The toolbar button will be enabled when the Participant Folder is active. It has a tool tip text of "Close Participant Folder".



Figure 13- Close Participant Folder Toolbar Button

3.3.4 Processing

3.3.4.1 Print Participant Summary

Upon selection of the Print Participant Summary toolbar button:

- If the participant does not have certification information the following message is displayed: "A certification attempt must exist on the system to produce a Participant Summary for the household member."
- If the participant has certification information, the system will invoke the Produce Participant Summary dialog defined in [System Outputs Chapter 01 – System Outputs](#).

3.3.4.2 Close Participant Folder

Upon selection of the Close Participant Folder toolbar button, the system closes the Participant Folder and returns to the Participant List. When the participant whose folder was opened still remains on that view of the Participant List, their record will be selected.

3.4 Menu Exceptions

In addition to the system menu options, when the Participant Folder is active, several additional menu items are available.

3.4.1 Participant Activities Menu

The menu will be enabled when the Participant Folder Window is active. Its mnemonic is "P". It will display the following Menu Items:

- Participant Activities
 - Print Participant Appointment Schedule
 - Breastfeeding
 - Review CPA-determined Follow-up Information
 - Work with Another Household Member
 - Manage Notes
 - Manage Alerts
 - Print Participant Summary
 - Close Participant Folder

3.4.1.1 Print Participant Appointment Schedule Menu Item

The menu item will be enabled when the Participant Folder is active. Its mnemonic is "I".

3.4.1.2 Breastfeeding Menu Item

The menu item will be enabled when the Participant Folder is active. Its mnemonic is "B".

3.4.1.3 Review CPA-determined Follow-up Information Menu Item

The menu item will be enabled when the Participant Folder is active and the participant is in a valid certification period. Its mnemonic is "P".

3.4.1.4 Work with Another Household Member Menu Item

The menu item will be enabled when the Participant Folder is active. Its mnemonic is "W".

3.4.1.5 Manage Notes Menu Item

The menu item will be enabled when the Participant Folder is active. Its mnemonic is "N".

3.4.1.6 Manage Alerts Menu Item

The menu item will be enabled when the Participant Folder is active. Its mnemonic is "L".

3.4.1.7 Print Participant Summary Menu Item

The menu item will be enabled when the Participant Folder is active. Its mnemonic is "R".

3.4.1.8 Close Participant Folder Menu Item

The menu item will be enabled when the Participant Folder is active. Its mnemonic is "C". (See Processing for [Close Participant Folder Toolbar Button](#))

3.4.2 Participant Activities Menu Items Processing

3.4.2.1 Print Participant Appointment Schedule

Upon selection of the Print Participant Appointment Schedule menu item, the system will invoke the Generate Participant Appointment Schedule dialog as described in Clinic *Chapter 08 – Appointment Scheduling*.

3.4.2.2 Breastfeeding

Upon selection of the Breastfeeding menu item, the system will display the following sub-menu items:

- Item Issuance History (mnemonic of 'H')
- Peer Counselor Contacts (mnemonic of 'B')

3.4.2.2.1 Item Issuance History

Upon selection of the Item Issuance History menu item, if the user does not have the appropriate permissions (BreastfeedingItemIssuance.View, Add or FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to manage breastfeeding supplies. Please see the supervisor."

If the user has permission, the system will display the Breastfeeding Item Issuance History dialog as described in this chapter.

3.4.2.2.2 Peer Counselor Contacts

Upon selection of the Breastfeeding Peer Counselor Contacts menu item, if the user does not have the appropriate permissions (BreastfeedingContacts.View, Add or FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to view breastfeeding peer counselor contact information. Please see the supervisor."

If the user has permission, the system will invoke the Breastfeeding Peer Counselor Contacts dialog described in this chapter.

3.4.2.3 Review CPA-determined Follow-up Information

Upon selection of the Review CPA-determined Follow-up Information menu item, if the user does not have the appropriate permissions (CPAFollowUp.FullControl), a standard error dialog is invoked with the text, "You do not have the necessary permissions to update CPA-determined follow-up information. Please see the supervisor."

If the user has permission, the system will invoke the CPA-determined Follow-up dialog described in this chapter.

3.4.2.4 Work with Another Household Member

Upon selection of the Work with Another Household Member menu item, the system will check for additional household members. If there are no other household members associated with the selected participant's household ID, the system will invoke a standard message with the message text, "No additional members exist for this household." Upon dismissing the message, the system will return to the participant's folder.

If additional members are found with the associated household ID, the system will invoke the [Work with Another Household Member \(Participant Folder\)](#) dialog defined in Common Interface Panels *Chapter B – Work with Another Household Member*.

3.4.2.5 Manage Notes

Upon selection of the Manage Notes menu item, the system will invoke the View Notes for Household Member dialog as defined in this document.

3.4.2.6 Manage Alerts

Upon selection of the Manage Alerts menu item, the system will invoke the Alerts list for Household dialog as defined in this document.

3.4.2.7 Print Participant Summary

Upon selection of the Print Participant Summary menu item

- If the participant does not have certification information the following message is displayed: "A certification attempt must exist on the system to produce a Participant Summary for the household member."
- If the participant has certification information, the system will invoke the Produce Participant Summary dialog defined in [System Outputs Chapter 01 – System Outputs](#).

3.4.2.8 Close Participant Folder

Upon selection of the Close Participant Folder menu item, the system closes the Participant Folder and returns to the Participant List. When the participant whose folder was opened still remains on that view of the Participant List, their record will be selected.

3.4.3 Document Imaging Menu

The menu will be enabled when the Participant Folder is active. Its mnemonic is "D". It will display the following Menu Items:

- Scan a Document
- View Scanned Documents

3.4.4 Menu Items

3.4.4.1 Scan a Document

The menu item is disabled when the Participant Folder is active. Its mnemonic is "S".

3.4.4.2 View Scanned Documents

The menu item will be enabled when the Participant Folder is active. Its mnemonic is "V".

3.4.5 Document Imaging Menu Processing

3.4.5.1 View Scanned Documents

Upon selection of the View Scanned Documents sub-menu, the system will check the permissions for the currently logged-on user to determine if they have the DocumentImaging.View permission. If the user does not have appropriate permissions, the system invokes a standard error message with the text, "You do not have the necessary permissions to view scanned documents. Please see the supervisor." If the user does have the DocumentImaging.View permission, the system will display the Scanned Documents dialog as described in this document

3.5 Scanned Documents

The Scanned Documents Dialog allows the user to view scanned documents. It is invoked when the user selects Document Imaging ->View Scanned Documents menu from the Participant Folder

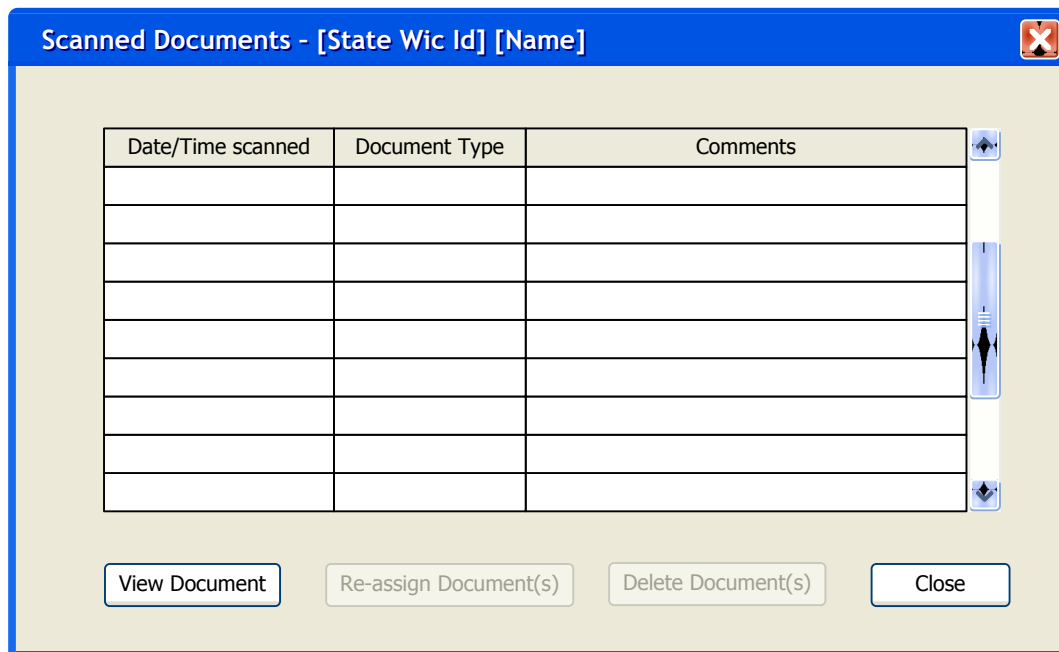


Figure 14 –Scanned Documents Dialog

3.5.1 Controls

The common controls for this dialog are described in Clinic - [Chapter 14 - Document Imaging](#).

3.5.2 Processes

3.5.2.1 Initializing the Interface

Upon initial display of the Scanned Documents dialog:

- The Re-assign Document(s) and Delete Document(s) buttons are disabled.

3.6 Breastfeeding Item Issuance History

The Breastfeeding Item Issuance History dialog allows the user to view the breastfeeding items that have been issued to the current participant. It is invoked when the user selects Breastfeeding > Item Issuance History menu item when the Participant Folder is active.

The screenshot shows a Windows-style dialog box titled "Breastfeeding Item Issuance History for ALICIA PATTERSON". The dialog has a blue title bar with a close button (X) in the top right corner. The main area is light beige. It contains two sections: "Date Issued" and "ItemType". The "Date Issued" section has "From" and "To" labels with date pickers showing "12/24/2007" and "3/23/2008" respectively. The "ItemType" section has three checkboxes: "Breast Pumps" (checked), "Breastfeeding Kits" (unchecked), and "Breastfeeding Supplies" (unchecked). To the right of these sections are "Search" and "Clear" buttons. Below these is a large, empty rectangular list box. At the bottom of the dialog are three buttons: "Issue Items", "Return Pump", and "Close".

Figure 15 – Breastfeeding Item Issuance History Dialog

3.6.1 Controls

The common controls for this dialog are described in Common Interface Panels - [Chapter P - Breastpumps, Breastfeeding Kits and Supplies](#).

3.6.2 Processes

3.6.2.1 Initializing the Interface

Upon initial display of the Breastfeeding Item Issuance History dialog:

- The Issue Items and Return Pump buttons are disabled.

3.7 Breastfeeding Peer Counselor Contacts

The Breastfeeding Peer Counselor Contacts dialog allows the user to view previous breastfeeding peer counselor contacts with the participant. It is displayed when the user selects the Participant Activities > Breastfeeding > Peer Counselor Contacts menu item from the Participant Folder.

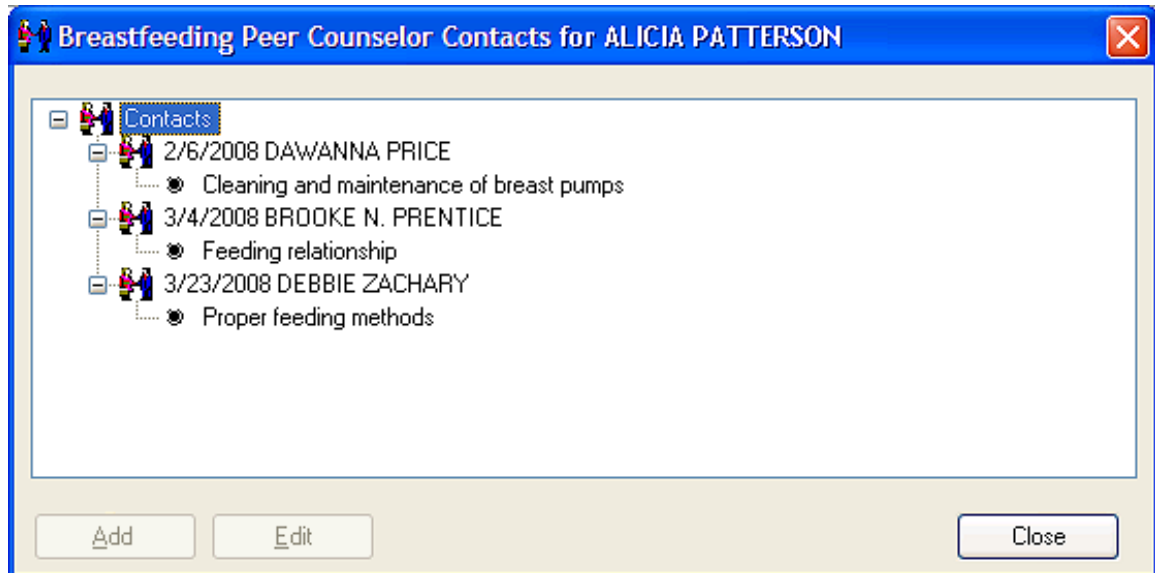


Figure 16 – Breastfeeding Peer Counselor Contacts Dialog

3.7.1 Controls

The common controls for this dialog are described in Common Interface Panels - [Chapter Q - Breastfeeding Peer Counselor Contacts](#).

3.7.2 Processes

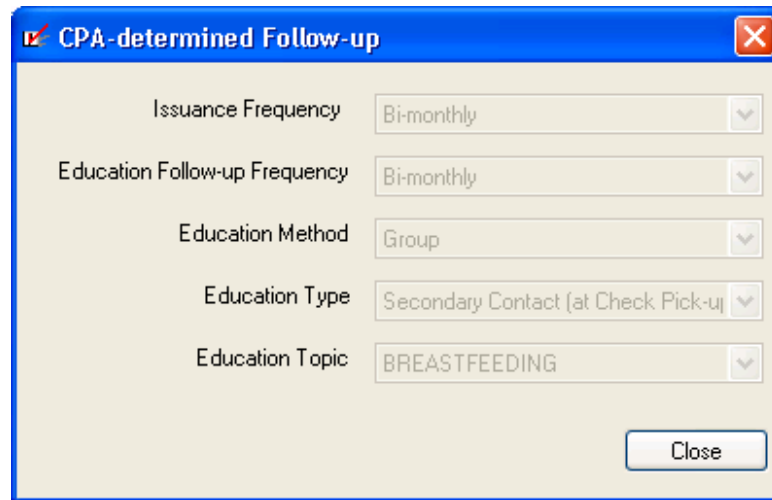
3.7.2.1 Initializing the Interface

Upon initial display of the Breastfeeding Peer Counselor Contacts dialog:

- The Add and Edit buttons are disabled.

3.8 CPA-determined Follow-up

The CPA-determined Follow-up window allows the user to review follow-up information for the participant.



CPA-determined Follow-up

Issuance Frequency: Bi-monthly

Education Follow-up Frequency: Bi-monthly

Education Method: Group

Education Type: Secondary Contact (at Check Pick-up)

Education Topic: BREASTFEEDING

Close

Figure 17 - CPA-determined Follow-up Dialog

3.8.1 Controls

The common controls for this dialog are described in Common Interface Panels - [Chapter O - CPA Determined Follow-up](#).

3.8.1.1 Close Button

The Close button will be enabled when the CPA-determined Follow-up window is active. Characteristics for the Close button are defined in Consistencies.

3.8.2 Processes

3.8.2.1 Initializing the Interface

Upon initial display of the dialog:

- The Issuance Frequency dropdown is disabled.
- The Education Follow-up Frequency dropdown is disabled.
- The Education Method dropdown is disabled.
- The Education Type dropdown is disabled.
- The Education Topic dropdown is disabled.
- The OK and Cancel buttons are hidden.

3.9 View Notes for Household Member

The View Notes dialog allows the user to view previously created notes for the currently selected household member. The View Notes dialog is invoked when the user selects the [Manage Notes](#) list item from the Participant Activities menu.

Note Type	Date Created	Application Area	Staff Member
SOAP	2/4/2008	Certification	DPRICE
SOAP	9/26/2007	Demographics	DPRICE
SOAP	9/26/2007	Demographics	DPRICE
SOAP	7/19/2007	Food Prescription	DPRICE
SOAP	6/12/2007	Height/Weight	DPRICE

Selected Note Text

S:RC-CHILD, DISC R & R, DISC GROWTH CHART, DISC EATING HABITS OF CHILD, DISC DENTAL CARRIES OF DRINKING AFTER PARENT OR ANYONE ELSE, DISC HEALTHY SNACKS, DISC CHOKING HAZARDS, HOT DOGS, WHOLE GRAPES, PEANUTS, PEANUT BUTTER

O:
2/4/2008 28 inches 0/8 inches 20 pounds 1 ounces. Height for age percentile: 30.61% Weight for age percentile: 45.78%

Figure 18 - View Notes Dialog

3.9.1 Controls

The common controls for this dialog are described in Clinic - [Chapter 9 - Participant Folder](#).

3.9.2 Processes

3.9.2.1 Initializing the Interface

Upon initial display of the dialog:

- The Create SOAP Note button is disabled.
- The Create General Note button is disabled.

- The Create Breastfeeding Note button is disabled.

3.10 Alerts List for Household

The Alerts List for Household dialog allows the user to view the alerts defined for the currently selected household member and other members of the household. The user can also add, edit, or delete alerts for the household members. The Alerts List for Household dialog is invoked when the user selects the [Manage Alerts](#) menu item from the Participant Activities menu.

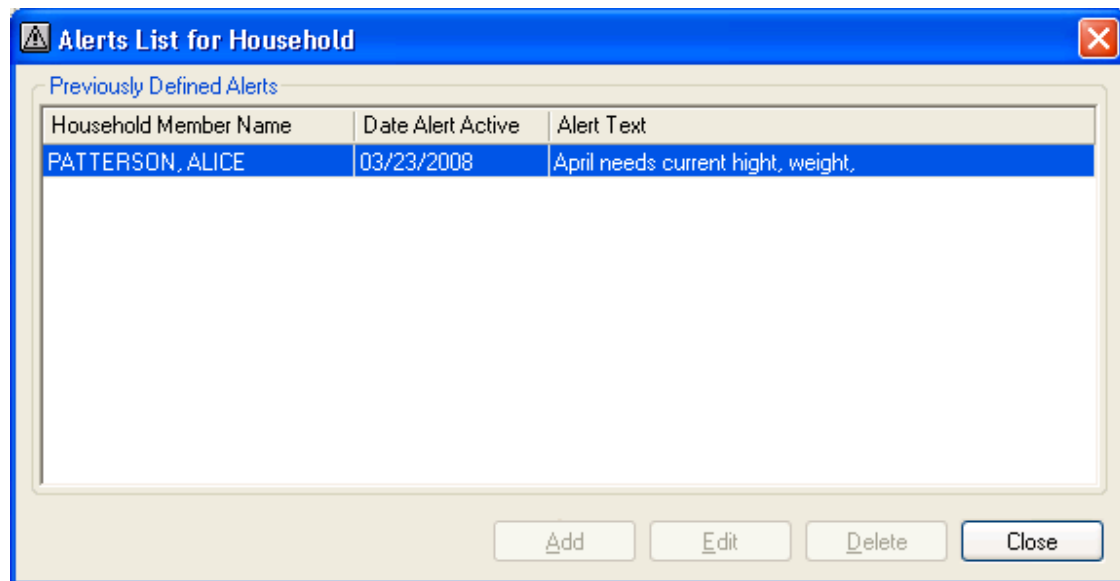


Figure 19 - Alerts List for Household Dialog

3.10.1 Controls

The common controls for this dialog are described in Clinic - [Chapter 9 - Participant Folder](#).

3.10.2 Processes

3.10.2.1 Initializing the Interface

Upon initial display of the dialog:

- The Add button is disabled.
- The Edit button is disabled.
- The Delete button is disabled.